



Security Role Profile ~ CalHR Roles

***Prepared by 21st Century Project
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Security Role Profile - CalHR Roles

Benefits Display

Benefits

Role Description: Benefits Display

The Benefits Display role allows display only access to Benefit Plans including: Health, Insurance, Savings, Flexible Spending, and Retirement Plans. This role can view benefit-related information, but does not have the ability to update employees' benefits. A person assigned this role should be someone that communicates benefit enrollment. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- Print benefit statements
- View benefit costs
- View benefit enrollment information
- View benefit participation
- View employee dependent information
- View employee's salary information
- View payroll deductions for employee
- Execute standard SAP Benefit Reports

Related Processes

- Benefits Enrollment
- Work and Life Event Changes

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- HRBEN0006 - Report Participant Overview
- HRBEN0015 - Benefit Confirmation Forms
- HRBEN0079 - Report Change of Eligibility Status
- HRBEN0081 - Stats Employee Demographics
- HRBEN0083 - Report Change of General Benefits
- HRBEN0087 - Stats Benefit Election Analysis
- HRBEN0089 - Stats Enrollment
- PA20 - Display HR Master Data
- ZBN_NOTICE_DEPTRN26 - Notice of Dependent Turning 26
- ZBN_PRE_PA_ACTIONS - Previous Day PA Actions
- ZBNR_BEN_ELG - Employees Who Had a Change in Benefit Eligibility
- ZBNR_DEDUC_NOT_TAKEN - Deduction Not Taken



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Benefits Display

Benefits

Commonly Used Infotypes

- Read Actions (0000)
- Read Additional Personal Data (0077)
- Read Address (0006)
- Read Basic Pay (0008)
- Read Corporate Functions (0034)
- Read Date Specifications (0041)
- Read Family Dependent (0021)
- Read Flexible Spending Accounts (0170)
- Read General Benefits Information (0171)
- Read Health Plans (0167)
- Read Insurance Plans (0168)
- Read Miscellaneous Plans (0377)
- Read Monitoring of Task (0019)
- Read Org Assignment (0001)
- Read Other US Taxes (0235)
- Read Payroll Status (0003)
- Read Personal Data (0002)
- Read Planned Working Time (0007)
- Read Qualifications (0024)
- Read Residence Status (0094)
- Read Residence Status (VISA) (0048)
- Read Savings Plans (0169)



Security Role Profile - CalHR Roles

DPA Benefits

Benefits

Role Description: DPA Benefits

The DPA Benefits role approves enrollment exceptions and create adjustment reasons when applicable. This role should be limited to the Department of Personnel Administration (DPA) Benefits users only.

Tasks/Responsibilities

- Approve enrollment exceptions
- Communicate with Benefits Processor on approval/denials
- Views benefit information

Related Processes

- Benefits Enrollment
- Work and Life Event Changes

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- Benefits Display

Key Transaction Codes

- PA20 - Display HR Master Data
- PA30 - Maintain HR Master Data

Commonly Used Infotypes

- Read General Benefits Information (0171)
- Read Org Assignment (0001)
- Update Adjustment Reasons (0378)



Security Role Profile - CalHR Roles



DPA Benefits Reports Runner

Benefits

Role Description: DPA Benefits Reports Runner

The DPA Benefit Reports Runner role allows access to run Benefit Reports that are applicable to the Department of Personnel Administration (DPA) group. This role should be limited to the DPA Benefits users only.

Tasks/Responsibilities

- Execute Benefit Reports in BW applicable to DPA Benefits

Related Processes

- Benefits Enrollment
- Work and Life Event Changes

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- Benefits BW Reports – DPA Benefit Reports
- Benefits BW Reports – BU Profile Reports
- Benefits BW Reports – Table 183 Reports

Key Transaction Codes

- BN BW BU Profile Reports - Average Base Pay
- BN BW BU Profile Reports - Benefit Cost
- BN BW BU Profile Reports - Benefit Data
- BN BW BU Profile Reports - COBEN Costs
- BN BW BU Profile Reports - Contributions and Counts
- BN BW BU Profile Reports - Count By Shift
- BN BW BU Profile Reports - Days By Disability
- BN BW BU Profile Reports - Dues and Fair Share
- BN BW BU Profile Reports - Employee Counts
- BN BW BU Profile Reports - Employee Counts By ESG
- BN BW BU Profile Reports - Gross Pay
- BN BW BU Profile Reports - Leave
- BN BW BU Profile Reports - Leave Balances
- BN BW BU Profile Reports - Leave Max
- BN BW BU Profile Reports - Leave Usage By Department
- BN BW BU Profile Reports - Leave Usage With OT
- BN BW BU Profile Reports - Longevity



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DPA Benefits Reports Runner

Benefits

- BN BW BU Profile Reports - Non-COBEN Costs
- BN BW BU Profile Reports - Premium Pay
- BN BW BU Profile Reports - Retirement
- BN BW BU Profile Reports - Vacancy
- BN BW DPA Benefit Reports - DPA Annual Flex Elect and CoBen Enrollee Counts
- BN BW DPA Benefit Reports - DPA Dental Enrollment Counts
- BN BW DPA Benefit Reports - DPA Dept FSA Participants by Department
- BN BW DPA Benefit Reports - DPA Flex Open Enrollment Count
- BN BW DPA Benefit Reports - DPA Judges and Statutory Employees Enrolled in FSA
- BN BW DPA Benefit Reports - DPA Medical FSA HIPAA Notices
- BN BW DPA Benefit Reports - DPA TPA Basic Life New Enrollees and Addresses
- BN BW DPA Benefit Reports - DPA TPA LTD New Enrollees
- BN BW Table 183 Reports

Commonly Used Infotypes

- None



Security Role Profile - CalHR Roles

DPA Benefits Savings Plus Processor

Benefits

Role Description: DPA Benefits Savings Plus Processor

This role has the ability to maintain employees' Savings Plus data. This data is interfaced in from the third party administrator (currently Nationwide). The error file is forwarded to the DPA Benefits Savings Plus Processor. This role provides the ability to correct the employee information in MyCalPAYS in the event the interfaced information is incorrect. This role is intended to be given to the users in Department of Personnel Administration (DPA) responsible for the Savings Plus Program and is limited to 1-3 individuals.

Tasks/Responsibilities

- Maintain employees' Savings Plus data
- View Savings Plus data interfaced in from Third Party Administrator

Key Transaction Codes

- HRBEN0001 - Enrollment Plans
- PA20 - Display HR Master Data
- PA30 - Maintain HR Master Data

Commonly Used Infotypes

- Read General Benefits Information (0171)
- Read Org Assignment (0001)
- Read Personal Data (0002)
- Update Adjustment Reasons (0378)
- Update Savings Plan (0169)



Security Role Profile - CalHR Roles

DPA Personnel Administration (PA)

Personnel Administration

Role Description: DPA Personnel Administration (PA)

The Department of Personnel Administration (DPA) Personnel Administration (PA) role provides access to view information for all employees statewide and access to Business Warehouse reports. This role should be limited to the DPA PA users only.

Tasks/Responsibilities

- Support Union Activities
- Responsible for monitoring salaries and benefits for civil service employees.
- Issues Pay Letters for changes in salary, benefits or reclassifications.

Related Processes

- Personnel Administration Actions

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- Benefits Display
- Payroll Display
- Time Display
- HR Personnel Display
- Organization Management Display
- Personnel Administration (PA) BW Reports – Employee Non-Confidential (Agencies)
- Personnel Administration (PA) BW Reports - Employee Confidential

Key Transaction Codes

- None

Commonly Used Infotypes

- See Infotypes for Roles listed in Role Dependencies



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DPA Seniority Processor

Time Management

Role Description: DPA Seniority Processor

The DPA Seniority Processor role is responsible for adjusting State Service Credit and Seniority Credits.

Tasks/Responsibilities

- Adjust State Service Credit
- Adjust Seniority Credits

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- PA51 – Display Time Data
- PA61 – Maintain Time Data

Commonly Used Infotypes

- Udate Time Transfer Specifications (2012)

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DPA Time

Time Management

Role Description: DPA Time

The DPA Time role has access to view information for all employees statewide and access to Business Warehouse reports. This role should be limited to the Department of Personnel Administration (DPA) Time users only.

Tasks/Responsibilities

- Support Union Activities
- Responsible for monitoring salaries and benefits for civil service employees.
- Issues Pay Letters for changes in salary, benefits or reclassifications

Related Processes

- Personnel Administration Actions

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- Time Display
- Time BW Reports – Time Seniority

Commonly Used Infotypes

- Read Org Assignment (0001)



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HR Personnel Display

Personnel Administration

Role Description: HR Personnel Display

The HR Personnel Display role has the ability to display and generate reports on human resources data associated with personnel administration actions. The role also allows for viewing and generating reports on sensitive employee data, such as age, gender, ethnicity, salary, and disability. This role is designed for agency HR Directors and associated pertinent staff only. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- View and generate reports on HR data associated with personnel administration actions
- View and generate reports on sensitive employee data, including age, gender and ethnicity
- View and generate reports on such employment data as employee, salary, and disability

Related Processes

- Display Personnel Administration Actions
- Display Employee Data

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- PA20 - Display HR Master Data
- S_AHR_61016362 - Flexible Employee Data
- S_PHO_48000450 - Date Monitoring
- ZPA_EMPL_INFO_DOC - Employment Information Document

Commonly Used Infotypes

- Read Actions (0000)
- Read Additional Abx. Data (0082)
- Read Additional Payments (0015)
- Read Additional Personal Data (0077)
- Read Address (0006)
- Read Basic Pay (0008)
- Read Date Specifications (0041)
- Read Employee Action Substantiation (9007)
- Read Main Personal Assignment (0712)
- Read Monitoring of Task (0019)
- Read Org Assignment (0001)



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HR Personnel Display

Personnel Administration

- Read Payroll Status (0003)
- Read Personal Data (0002)
- Read Planned Working Time (0007)
- Read Qualifications (0024)
- Read Recurring Payments/Deductions (0014)
- Read Time Quota (0416)

Security Role Profile - CalHR Roles

Organization Charting Tool (Nakisa)

Organizational Management

Role Description: Organization Charting Tool (Nakisa)

Nakisa is used to extract organization information from MyCalPAYS and present it in an Organization Chart format. This provides a traditional organizational chart diagram that is familiar to Human Resource administrators. There are a limited number of user licenses for this software. For the whole State of CA there are only 3000 licenses available. Therefore, the agency may wish to consider assigning the role to key agency HR staff. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- Ability to provide organizational charts either printed or electronically
- Generate and distribute organizational charts
- Utilize Nakisa as a quality review measure since the organization chart diagram is presented in a format familiar to HR administrators and more convenient to view than the SAP organization structure

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- Organization Management Display

Key Transaction Codes

- None

Commonly Used Infotypes

- None



Security Role Profile - CalHR Roles

Organizational Management (OM) Display

Organizational Management

Role Description: Organizational Management (OM) Display

The Organization Management Display role has the ability to display the MyCalPAYS organization structure, positions and jobs within the organization, along with the employees that have been assigned to the positions. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- Display to jobs and positions
- Display to the SAP organization structure
- Execute SAP standard reports to view jobs, positions and organization structure

Related Processes

- Create or Edit Position
- Create and Maintain Organizational Unit

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- P013D - Display Position
- PO03D - Display Job
- PO10D - Display Org Unit
- PPOSE - Display Org Structure
- PPSS - Display Structure
- S_AHR_61016491 - Report Existing Org Units
- S_AHR_61016493 - Report Org Structure
- S_AHR_61016494 - Report Org Structure with Positions
- S_AHR_61016495 - Report Org Structure with Persons
- S_AHR_61016497 - Report Existing Jobs
- S_AHR_61016498 - Report Job Index
- S_AHR_61016499 - Report Job Description
- S_AHR_61016501 - Report Complete Job Description
- S_AHR_61016502 - Report Existing Positions
- S_AHR_61016504 - Report Position Description
- S_AHR_61016505 - Report Task Description - Positions
- S_AHR_61016509 - Report Vacant/Obsolete Positions



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Organizational Management (OM) Display

Organizational Management

- S_AHR_61016528 - Report Structure Display/Maintenance
- S_AHR_61018831 - Report Obsolete Positions
- S_AHR_61018869 - Report Periods of Unoccupied Positions

Commonly Used Infotypes

- Read Account Assignment Features (1008)
- Read Additional Job Attributes (9003)
- Read Descriptions (1002)
- Read Employee Group/Subgroup (1013)
- Read General Attributes (1222)
- Read Justify Re-establishment (9012)
- Read Objects (1000)
- Read Planned Compensation (1005)
- Read Position Attributes (9002)
- Read Relationships (1001)
- Read US Job Attributes (1610)
- Read Vacancy (1007)
- Read Work Schedule (1011)

Payroll Display

Payroll

Role Description: Payroll Display

The Payroll Display role has the ability to display and execute reports associated with payroll results and master data. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- Display pay dates
- Display payroll results
- View general tax information
- View payroll journals
- View payroll statistics
- View time data
- View W-4 information

Related Processes

- Payroll Processing

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- PA20 - Display HR Master Data
- PC_PAYRESULT - Display Results
- PC00_M10_CEDT - Remuneration Statement
- PC00_M10_HRF_PJ_ASCE - Display Payroll Journal (Central)
- PC00_M10_REC - Payroll Reconciliation Report
- PC00_M99_CLGA09 - Wage Type Statement
- PC00_M99_CWTR - Wage Type Reporter
- S_AHR_61018754 - Display Payroll Results
- S_PH9_46000172 - Wage Type Reporter
- S_PH9_46000361 - W-4 Withholding Allowance Report
- ZPC00_M10HRF_PJ_PRCE - Display Payroll Journal
- ZPY_IDL_LC4800_STATS - Payroll/IDL/LC4800 Gross Statistics



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Payroll Display

Payroll

Commonly Used Infotypes

- Read Absence Donation/Withdrawal (US) (0613)
- Read Absence Quotas (2006)
- Read Absences (2001)
- Read Actions (0000)
- Read Additional Off-Cycle Payments (0267)
- Read Additional Payments (0015)
- Read Additional Withholding Info US (0234)
- Read Address (0006)
- Read Adjustment Reasons (0378)
- Read Attendance (2002)
- Read Bank Details (0009)
- Read Basic Pay (0008)
- Read Cost Distribution (Employee) (0027)
- Read Cost Distribution (Position) (0018)
- Read Credit Plans (0236)
- Read Date Specifications (0041)
- Read Exclude Contract from Chargeback (0941)
- Read Family Dependent (0021)
- Read Flexible Spending Accounts (0170)
- Read General Benefits Information (0171)
- Read Health Plans (0167)
- Read Imputation of Pension (0326)
- Read Insurance Plans (0168)
- Read IRS Limits USA (0161)
- Read Main Personal Assignment (0712)
- Read Miscellaneous Plans (0377)
- Read Monitoring of Task (0019)
- Read Org Assignment (0001)
- Read Other US Taxes (0235)
- Read Payroll Results Adjustment (0221)
- Read Payroll Status (0003)
- Read Personal Data (0002)
- Read Planned Working Time (0007)
- Read Quota Corrections (2013)



Security Role Profile - CalHR Roles



Payroll Display

Payroll

- Read Recurring Payments/Deductions (0014)

- Read Residence Status (0094)

- Read Residence Status (VISA) (0048)

- Read Savings Plans (0169)

- Read Tax Treaty (0556)

- Read Time Quota (0416)

- Read Time Transfer Specifications (2012)

- Read US Overpayment Recovery (0909)

- Read Withholding Info W4 (0210)

- Read WS Substitutions (2003)



Security Role Profile - CalHR Roles

Time Display

Time Management

Role Description: Time Display

The Time Display role has the ability to display time data including absences, attendances, and work schedules for employees. This role only provides display access and has no update capabilities.

Tasks/Responsibilities

- View absence quotas
- View absence and attendance reports
- View planned working time
- View quota compensation information
- View substitutions
- View time accounts
- View time approvals
- View time reports
- View time statement
- View timesheets

Related Processes

- Time Management Processes

Role Conflicts

Those assigned this role should not be assigned the following roles to prevent conflicts of interests and to allow for segregation of duties:

- None

Role Dependencies

Those assigned this role will also be assigned the following roles:

- None

Key Transaction Codes

- CAOR - Display Report (Structure-Related)
- CAT3 - Timesheet
- CAT8 - CATS: Object
- CATS_DA - Display Working Times
- CATSXT_DA - Display Work Time and Tasks
- PA51 - Display Time Data
- PT_BAL00 - Cumulated Time Evaluation Results
- PT_QTA10 - Display Absence Quota Information
- PT63 - Personal Work Schedule



Security Role Profile - CalHR Roles



Time Display

Time Management

Commonly Used Infotypes

- Read Absence Quotas (2006)
- Read Absences (2001)
- Read Additional Abx. Data (0082)
- Read Attendance (2002)
- Read Date Specifications (0041)
- Read Org Assignment (0001)
- Read Planned Working Time (0007)
- Read Quota Corrections (2013)
- Read Time Quota (0416)
- Read Time Transfer Specifications (2012)
- Read WS Substitutions (2003)

